

Adding an Email & Sending Enrollment Credentials

Date created: April 8, 2022

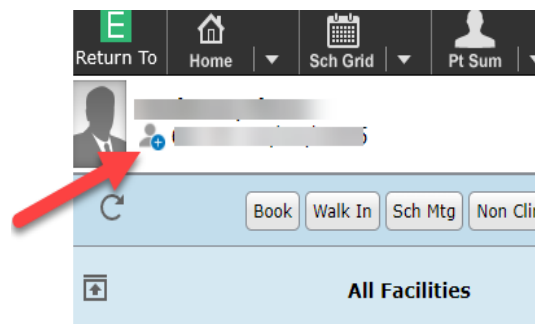
Audience: Clinical staff, Registration Clerks, Clerical staff

Overview

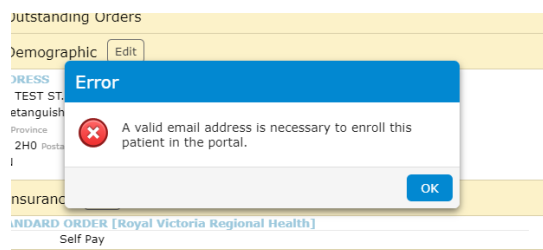
If a patient is requesting to enrol in the portal an email address is required in their Expanse profile.

Ambulatory:

If a grey icon with blue + is displayed, this means the patient has not enrolled in the portal. To enroll the patient, they must have an email address in Expanse.



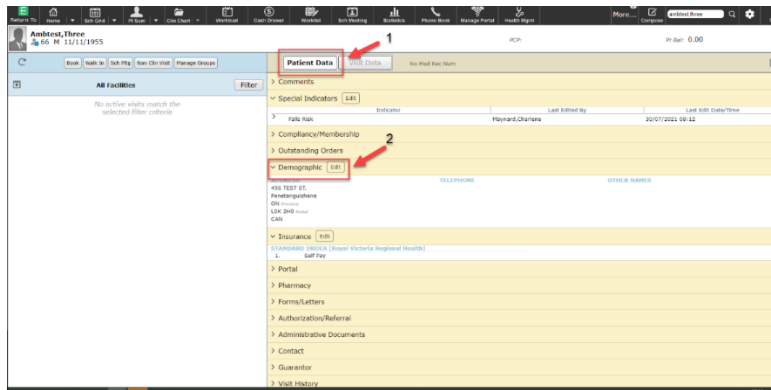
If you click on the icon the pop up below appears indicating the patient does not have an email address on file in Expanse and is unable to enroll.



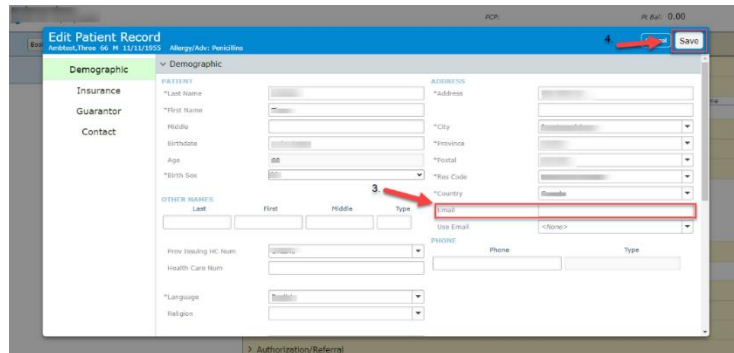
To add an email address in AMB:

- Click **“Patient Data”**
- Click **“Demographic”**

- Click **Edit**

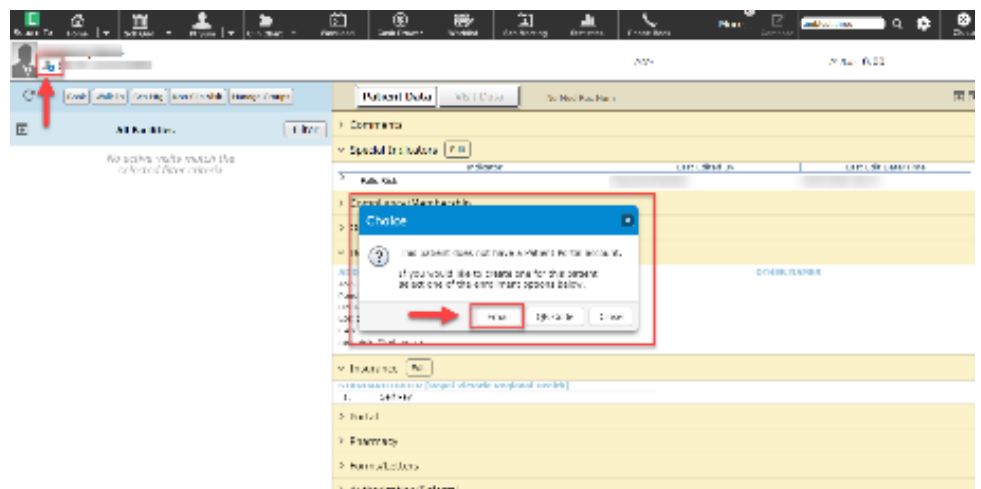


- Enter the **Email** address
- Click **Save**



Once the email address has been added to the account an email can now be sent to the user to enroll in the portal

- Click on the **+**
- Click **Email** to send the portal enrollment to the patient's email (Note: we are not using QR codes)

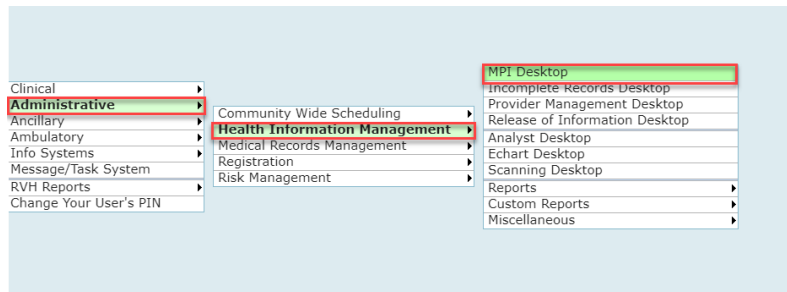


The user will receive the one-time user credentials to their email and can complete the registration process.

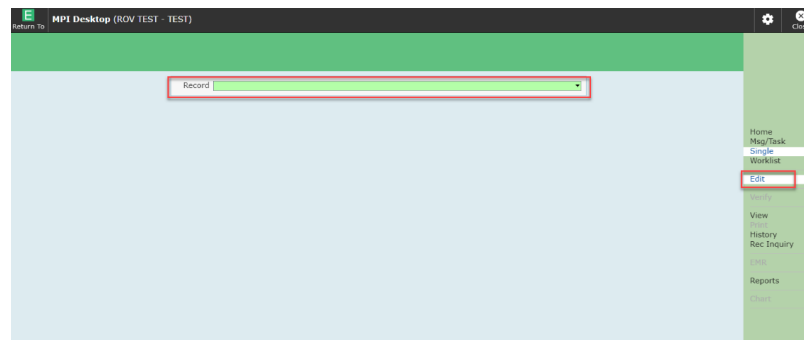
*Note: The credentials are valid for **48 hrs**, if the user does not complete the registration by then they will need to have credentials resent.*

Acute:

- Open **MPI Desktop** following the path below:

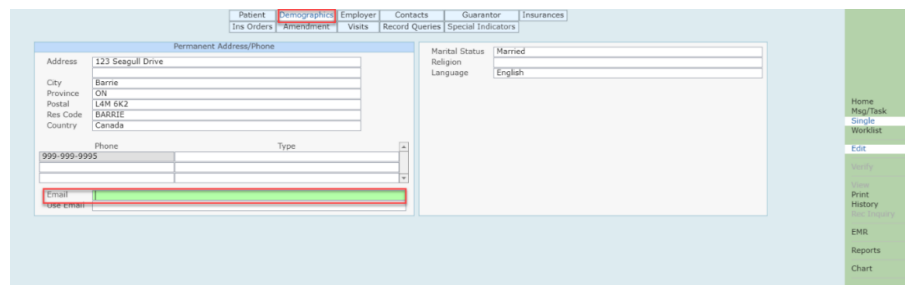


- Search for patient in the **Record** field
- Click **Edit**



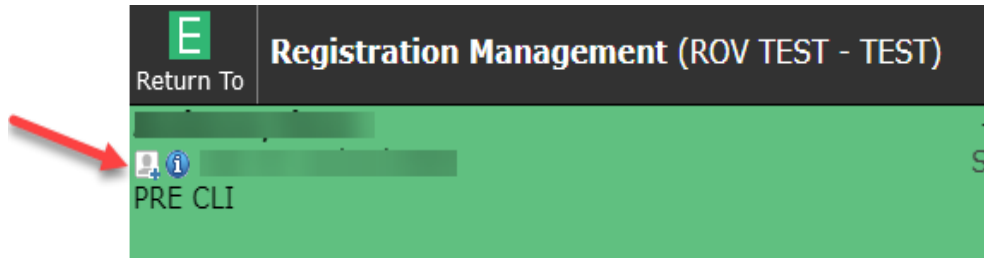
Click on the **Demographics** tab

- Enter the patient's **Email**
- Click **Save**



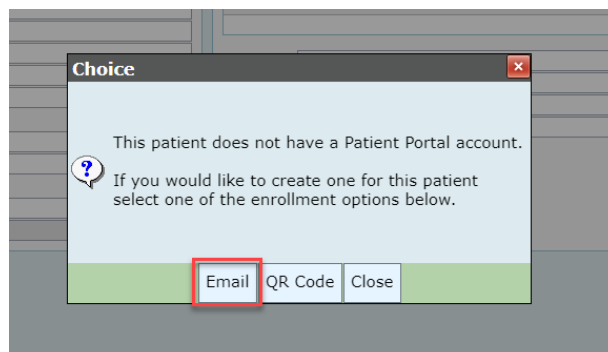
Once the email has been successfully saved into the chart, Search the patient again in Registration Management or MPI

- Click the + Icon to enroll the patient for portal.



The pop-up below will appear showing that the patient has an email address in Expense.

- Click **Email** to send the portal enrollment to the patient's email (Note: we are not using the QR code function)



The user will receive the one-time user credentials to their email and can complete the registration process.

*Note: The credentials are valid for **48 hrs**, if the user does not complete the registration by then they will need to have credentials resent.*

To resend credentials, search the patient in MPI or Registration desktop, click the + icon, and under reset credentials click username and then choose to send by email.

Please contact portal support if there are any issues at 705-797-2955.

